priority™

***Priority* for Integrated Systems Script**

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/Priority_for_Integrated_Systems.htm
Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN:

1. THE COMPANY ENVIRONMENT IN WHICH YOU ARE RECORDING MUST HAVE A NAME SUITABLE TO A SECURITY SYSTEMS COMPANY, SUCH AS "ALPHA SECURITY & ALARMS".

2. TECHNICIANS TO BE USED IN THESE CLIPS: FIRSTLY GARY COHEN. ALSO JOE SHANDRICK, MARIA TUKMACHEVA, ROSE VENTURE, MURRAY TRAVERS. OTHER OPTIONS (EMPLOYEES MARKED AS TECHNICIANS): BOB SMITH, MARK LENON, JENNIFER LOKINS.

3. OPEN THE "CUSTOMER DASHBOARD" FOR CUSTOMER NO. 7515, MAKE SURE THE "INVOICES TO CUSTOMER" WEB PART DISPLAYS THE "YEARLY" TAB; SEVERAL SERVICE CALLS APPEAR IN THE "SERVICE CALLS" TAB AT THE BOTTOM OF THE DASHBOARD AND AT LEAST ONE IS ASSIGNED A STATUS THAT IS FLAGGED AS "ACTIVE"; MINIMIZE.

4. DESIGN THE "SALES REP DASHBOARD" SO THAT THE UPPER LEFT CORNER DISPLAYS THE SALES FORECASTS WEB PART ("REP'S SALES FORECASTS"), UPPER RIGHT CORNER DISPLAYS THE SALES OPPORTUNITIES WEB PART ("REP'S SALES OPPS), BOTTOM LEFT CORNER DISPLAYS THE SALES ORDERS WEB PART ("REP'S ORDERS") AND BOTTOM RIGHT CORNER DISPLAYS THE CUSTOMER INVOICES WEB PART ("REP'S INVOICES"); MAKE SURE ENOUGH DATA IS DEFINED TO POPULATE ALL WEB PARTS NICELY.

5. SEND AN E-MAIL TO SALES REP X, MAKING SURE YOU HAVE ACCESS TO THE E-MAIL ACCOUNT IN QUESTION, CONTAINING A LINK TO AN OPEN AND ITEMIZED SALES OPPPORTUNITY **OP12000054** WITH A STATUS INDICATING EARLY STAGES (DEFINE A NEW STATUS IF NECESSARY) AND CONTAINING A MESSAGE REQUESTING AN UPDATE ON WHERE THINGS STAND WITH THE OPPORTUNITY. OPEN AND MINIMIZE THIS E-MAIL MESSAGE ON PC AND OPEN E-MAIL ON DEMO IPAD.

6. DEFINE A SALES OPP STATUS "ON HOLD".

7. IN NOTEPAD, RECORD NOTES ON SAMPLE CONVERSATION WITH CUSTOMER CONTACT REGARDING SALES OPPORTUNITY **OP12000054**, SOMETHING LIKE: THE CUSTOMER IS INTERESTED IN LEARNING MORE BUT WON'T HAVE THE BUDGET TO UPGRADE HIS SECURITY SYSTEM UNTIL NEXT YEAR. MINIMIZE NOTEPAD.

8. IN LITE INTERFACE, LOGIN AS GARYC AND PRESS CUSTOMER RELATIONS. IN SALES OPPORTUNITIES, RETRIEVE OP # OP12000054 (HOME FURNITURE LTD).`\

9. MAKE SURE ENOUGH DATA IS DEFINED TO POPULATE ALL WEB PARTS IN THE "SERVICE MANAGER DASHBOARD" NICELY. MAKE SURE THE "SERVICE CALLS REQUIRING ATTN", SERVICE CALLS, TECHNICIAN SCHEDULING AND SERVICE FOR CUSTOMER WEB PARTS ARE DISPLAYED WITHIN THE DASHBOARD.

10. SET UP CUSTOMER "DISCOUNT BICYCLES LTD" WITH A NUMBER OF CONTACTS; ONE OR TWO OF WHICH ARE FLAGGED AS A "SERVICE CONTACT". DEFINE TWO CUSTOMER SITES: WAREHOUSE AND SHOP.

11. IN THE PROJECTS FORM, OPEN A SALES PROJECT PR12000003 FOR THE CUSTOMER "DISCOUNT BICYCLES LTD". THE PROJECT DESCRIPTION MUST INCLUDE THE PHRASE "SALES PROJECT".

12. DEFINE THE FOLLOWING PROJECT ACTIVITIES FOR THIS PROJECT: INITIAL VISIT, PREPARE QUOTE, RECEIVE SALES ORDER, CONFIRM ORDER, PRE-INSTALLATION MEASUREMENTS, INSTALLATION.

13. ASSIGN SALES REP MARK LENON TO THE CUSTOMER, AND REPORT PROJECT HOURS FOR THIS REP TO THE "PREPARE QUOTE" PROJECT ACTIVITY (IN THE "REPORTS OF PROJECT HRS/EXPENSES" SUB-LEVEL FORM).

14. REPORT WORK HOURS OF SENIOR (IN-HOUSE) TECHNICIAN TO THIS PROJECT, UNDER THE "INITIAL VISIT" PROJECT ACTIVITY (IN THE "REPORTS OF PROJECT HRS/EXPENSES" SUB-LEVEL FORM).

15. OPEN PART RECORDS AND SERIALIZED PARTS, AS FOLLOWS:
    CONTROL CONSOLE (TWO SERIALIZED PARTS), INTERNAL SIREN (TWO SERIALIZED PARTS), EXTERNAL SIREN (TWO SERIALIZED PARTS), PIR DETECTOR (FOUR SERIALIZED PARTS), FIRE DETECTOR (TWO SERIALIZED PARTS), BACKUP BATTERY FOR CONSOLE (TWO SERIALIZED PARTS), BACKUP BATTERY FOR SIREN (FOUR SERIALIZED PARTS), SECURITY CAMERA (EIGHT SERIALIZED PARTS).

16. MAKE SURE THE FOLLOWING PART FAMILIES ARE DEFINED: WORK HOURS, DETECTORS, CAMERAS AND BATTERIES. ASSOCIATE EACH OF THE PARTS LISTED IN THE PREVIOUS SECTION WITH THE CORRESPONDING PART FAMILY.

17. RUN "OPEN SERVICE CONTRACT FOR PROJ" PROGRAM FOR PROJECT PR12000003. NOTE THAT THE SERVICE CONTRACT (X) MUST BE OPENED FOR THIS PROJECT AHEAD OF TIME AND ITEMIZED WITH THE LIST OF PARTS OPENED IN THE PREVIOUS SECTION (USE A SEPARATE LINE IN THE CONTRACT FOR EACH SERIALIZED PART). RECORD EITHER A "PRORATE CHARGE (%)" OR A "FLAT RATE CHARGE/YR" FOR EACH ITEM.

18. DEFINE THE SERVICE CONTRACT AS IN EFFECT FOR ONE YEAR.WITH A RENEWAL OPTION OF TWO YEARS.

19. OPEN PROJECTS FORM - DESIGN SO FIRST BUNCH OF SUB-LEVELS INCLUDES REPORTS OF PROJECT HRS/EXPENSES; PURCHASE ORDERS FOR PROJECT; PROJECT PLANNING; REPORTS OF PROJECT HRS/EXPENSES; REVENUE AND PROFIT FORMS.

20. IN THE " CATALOGUE OF PARTS W/SERIAL NOS." FORM, SET UP A PART RECORD (MAY BE FOR ONE OF THE ABOVE SERIALIZED PARTS) FOR WHICH COMPONENTS ARE DEFINED IN THE "SERIALIZED COMPONENTS OF PART" SUB-LEVEL FORM. CREATE A REALISTIC EXAMPLE, WITH HELP FROM THE INTERNET IF NECESSARY. ONE POSSIBLE EXAMPLE COULD BE A COMPUTER, WHICH INCLUDES SERIALIZED COMPONENTS SUCH AS A POWER SUPPLY, MEMORY CARD, MOTHERBOARD, ETC. EACH COMPONENT MUST HAVE A PART NUMBER AND A FEW SHOULD HAVE A DEFINED "SERIAL NUMBER-CHILD" AS WELL.

21. DEFINE SERVICE TERMS CALLED "SERVICE FOR NEW SYSTEMS". IN THE "CONDITIONS OF SERVICE TERMS" SUB-LEVEL FORM, PREPARE A LIST OF THE FOLLOWING PART FAMILIES: WORK HOURS (NOT BILLABLE), DETECTORS (NOT BILLABLE), CAMERAS (NOT BILLABLE) BATTERIES (BILLABLE). ASSOCIATE THE BATTERY PART NUMBERS DEFINED IN THE PREVIOUS SECTION, EXCEPT THE 'BACKUP BATTERY FOR CONSOLE' WITH FIXED

COMPONENTS. THE BACKUP BATTERY MUST BE ASSOCIATED WITH CONSUMABLE COMPONENTS.

22. MAKE SURE THE FOLLOWING SERVICE CALL STATUSES ARE DEFINED: OPENED, IN PROGRESS, AWAITING CUSTOMER INPUT, URGENT, COMPLETED.

23. IN THE BPM FLOW CHART, MAKE SURE LOGICAL PATHS ARE DEFINED BETWEEN THE ABOVE STATUSES. DEFINE A RULE FOR THE "COMPLETED" STATUS: SEND E-MAIL TO THE INDIVIDUAL IN THE "CONTACT" COLUMN WITH THE SUBJECT: "SERVICE CALL NUMBER <<CALL NUMBER>> HAS BEEN CLOSED" AND DEFINE THE FOLLOWING MESSAGE TEXT: "SERVICE CALL NUMBER <<CALL NUMBER>> HAS BEEN CLOSED. FOR MORE INFORMATION, SEE ATTACHED FILE." AND ATTACH THE DOCUMENT "PRINT SERVICE CALL FORM" USING THE "STANDARD FORMAT" PRINT FORMAT; FLAG THE "AS PDF OPTION".

24. PREPARE AN E-MAIL FROM THE CUSTOMER'S SERVICE CONTACT IN THE OUTLOOK INBOX, AND MAKE SURE THE MESSAGE CONTAINS A DESCRIPTION OF THE MALFUNCTION AND INCLUDES A JPEG ATTACHMENT CALLED "PHOTO".

25. BEFORE RECORDING, RUN THE "TECHNICIAN SCHEDULING CALENDAR". FROM THE UPPER VIEW MENU, SELECT "SELECT TECHNICIAN" AND USE THE CTRL KEY TO SELECT A NUMBER OF USERS. ASSIGN A NUMBER OF CALLS TO THESE USERS SO THAT THE DISPLAYED SCHEDULE LOOKS REALISTIC. SET ASIDE SEVERAL HOURS FOR HANDLING EACH CALL, ALLOW FOR TRAVEL TIME, ETC. DESIGN THE CALENDAR TO DISPLAY THE NEXT FEW WEEKDAYS, THEN CLOSE THE CALENDAR.

26. PREPARE A SLIDE SHOWING ALL SCRIPT HEADINGS AS A BULLETED LIST: CUSTOMER RELATIONS MANAGEMENT (CRM), SALES PROJECTS, SERVICE CONTRACTS, MANAGING TECHNICIANS, FIELD SERVICE MANAGEMENT, BILLING & FINANCIALS, EXECUTIVE REPORTS

27. ON THE ANDROID PHONE BEING USED FOR RECORDING THE FIELD SERVICE SECTION, MAKE SURE TO SELECT A DEFAULT APP (IF NECESSARY) TO BE USED WHEN CLICKING A MAP (GOOGLE MAPS) IN THE FIELD SERVICES APP SO THAT YOU WON'T BE PROMPTED TO SELECT AN APP WHILE RECORDING. CHECK OUT WHAT HAPPENS WHEN CLICKING THE PHONE, BAR CODE AND CAMERA ICONS AS WELL.

28. MAKE SURE A SITE, CALL TYPE, CUST'S PROBLEM ARE DEFINED FOR EACH CALL THAT SHOWS UP ON MOBILE DEVICE IN MARIA'S LIST OF OPEN SERVICE CALLS - THERE SHOULD BE SEVERAL, FOR VARIOUS DATES AND CUSTOMERS, FOR A REALISTIC EFFECT. MAKE SURE SEVERAL CALLS ARE SCHEDULED FOR MARIA 'TODAY', FOR VARIOUS CUSTOMERS ALL LOCATED IN THE SAME CITY, ONE OF WHICH IS OUR DEMO EXAMPLE FOR DISCOUNT BICYCLES.

29. DEFINE MALFUNCTION CODES AND RESOLUTION CODES THAT MAKE SENSE FOR THE PARTS USED IN THE ALPHA SECURITY & ALARMS COMPANY.

Introduction (00:00-01:30)

[SHOW PREPARED SLIDE]In this video, we will demonstrate ***Priority'***s Service Management software, an all-in-one solution for companies that sell integrated systems – such as security systems, HVAC (Heating, Ventilation and Air Conditioning) systems, elevator systems and the like – and provide ongoing service for these systems. This solution enables you to manage all pre-sale and post-sale activity relating to the integrated systems you provide – including warranty and maintenance of these systems – all within a single software package.

We'll begin with a brief demonstration of how to use ***Priority*** to oversee customer relations across the sales process[SHOW FIRST BULLET]. We'll then see how to organize the various costs associated with the sales process within a single sales project[SHOW SECOND BULLET]; work with service contracts[SHOW THIRD BULLET], and handle service calls: whether handled by help desk staff[SHOW FOURTH BULLET], or by field technicians[SHOW FIFTH BULLET]. Finally, we'll briefly review the financial tools integrated into ***Priority***'s customer service tools[SHOW SIXTH BULLET], as well as various executive reports that can help you manage the entire process[SHOW SEVENTH BULLET].

Note that ***Priority*** can be installed and run on both desktop and notebook computers, either locally or over the Internet[HIGHLIGHT THE TOP OF THE BROWSER]. The system can also be accessed from a variety of mobile devices running a variety of operating systems, ranging from rugged handheld devices to mobile phones and tablet computers.

CRM-Customer Relations Management (01:31-03:13)

[FROM THE **CRM** MENU, OPEN THE **Customer Relations Management** MENU]***Priority*** supports the entire sales process, from recording leads[HIGHLIGHT FORM TITLE], through opening sales opportunities[HIGHLIGHT FORM TITLE], to issuing quotes and processing orders[SWITCH TO **Sales** MENU AND HIGHLIGHT THE **Price Quotations** AND **Orders** MENUS, RESPECTIVELY].

[SHOW **Customer Dashboard**]Sales and marketing personnel who work with the customer client can open the **Customer Dashboard** to see an overview of annual sales to the customer[HIGHLIGHT **Invoices to Customer** WEB PART, WHICH SHOULD BE OPEN TO THE **Yearly** TAB], the customer's financial obligations[IN THE **Customer Name** TAB, HIGHLIGHT THE **Credit and Aging** SECTION], customer quotes[HIGHLIGHT TAB TITLE] and opportunities[HIGHLIGHT TAB TITLE] and, of particular interest, service calls[CLICK TAB]. This last item allows the employee to ensure that there are no active service calls for the customer[IN THE LIST OF CALLS, HIGHLIGHT THE **Status** COLUMN] before making a phone call offering a new product. If there *are* open service calls[CLICK ON A CALL WITH THE "Active" STATUS, OR SIMILAR], the salesperson knows to call and inquire about the status of the call, and to make sure the customer is satisfied with the service being provided, before offering a new product.

The **Sales Rep Dashboard**[SHOW] displays[HIGHLIGHT EACH WEB PART IN TURN] estimated sales forecasts, open sales opportunities, actual sales orders and customer invoices, among other options. You can display the data that are pertinent to the individual sales rep only or include data for the entire sales team[IN THE **Sales Forecasts** WEB PART, CLICK THE DROP DOWN LIST IN THE BOTTOM RIGHT CORNER AND SHOW THE OPTIONS: **This Rep Only/Rep's Sales Team**. GIVE A FEW SECONDS TO READ. CLOSE AND RETURN TO **Priority**].

All CRM functions are also available when accessing ***Priority*** on your mobile device. Thus, for example, a sales rep who receives an e-mail on his smartphone or tablet[RECORDING INSTRUCTIONS: SHOW E-MAIL IN IPAD AND ZOOM IN ON LINK TO SALES OPP. CUT TO PRIORITY LITE INTERFACE ON PC, SHOWING THE SALES OPP **OP12000054**] requesting an update on a particular sales opportunity can click the link in the e-mail to view the relevant sales opportunity, phone the customer contact[MOVE TO **Address** TAB AND HIGHLIGHT PHONE NUMBER] and then record notes on the conversation[MOVE TO REMARKS SUB-LEVEL AND PASTE IN PRE-RECORDED TEXT, SOMETHING LIKE: THE CUSTOMER IS INTERESTED IN LEARNING MORE BUT WON'T HAVE THE BUDGET TO UPGRADE HIS SECURITY SYSTEM UNTIL NEXT YEAR] and update the opportunity's status[TO "ON HOLD"] as needed.[PAUSE]

Sales Projects (03:14-05:36)

All sales related activities can be linked to a single project[OPEN **Project Management** MENU AND HIGHLIGHT **Projects** FORM], beginning with the initial price quote, enabling you to keep track of all relevant expenses from within the sales project[OPEN **Projects** FORM AND RETRIEVE PRE-DEFINED PROJECT]. Employees can report their progress on various related activities[ENTER THE **Project Planning** SUB-LEVEL FORM], such as [HIGHLIGHT CORRESPONDING ACTIVITIES AS MENTIONED]taking measurements or system installation, directly from the project record[PRESS **Esc**]. If the setup or installation requires the services of an external subcontractor, such as an electrical engineer, the corresponding purchase orders[HIGHLIGHT **Purchase Orders for Project** SUB-LEVEL FORM] can be linked to the project as well. By recording all actual and projected expenses against the project in this manner, you can begin to cost and scope the project even at the pre-sales stage.

In the **Reports of Project Hrs/Expenses**[MOVE TO PARALLEL SUB-LEVEL FORM] sub-level form, we can see all the work hours that have been reported at any stage of the process; in this case, reports have been entered by both the sales rep[SHOW REPORTS BY THE SALES REP] who works with this customer and the technician[SHOW REPORTS BY THE TECHNICIAN] who took measurements at the customer sites.

The **Revenue and Profit** form[MOVE TO PARALLEL SUB-LEVEL FORM] displays a summary of all costs and revenue associated with the sales project. Moving to the **Projected Rev** tab, note that the revenue currently stands at zero, as no sales order has been received yet and no goods have been shipped to the customer [HIGHLIGHT THE COLUMNS **Open Sales Orders** AND **Unbilled Shipments**]. Under the **Projected Cost** tab[CLICK TAB], you can see any costs associated with, say, purchase orders that were opened for the project but have not yet been billed[HIGHLIGHT **Open Purchase Orders** COLUMN]. Under **Actual Cost**[CLICK TAB], you see how much the project has actually cost so far; in this case, due to the labor reported by employees who have worked on the project[HIGHLIGHT **Reported Project Hours** COLUMN]. Later on, the costs listed here will also include any labor and parts that are expended on service calls recorded during the initial warranty period, which is included in the original sale. Thus, at the end of the initial warranty period, we'll be able to see whether the transaction as a whole has been profitable.

Once you succeed in closing the sale, you can open a service contract for the project directly from the **Projects** form[RETURN TO UPPER-LEVEL FORM AND HIGHLIGHT **Open Service Contract For Proj** PROGRAM IN LIST OF DIRECT ACTIVATIONS].Let's proceed[MOVE TO THE **Service Contracts for Projects** SUB-LEVEL FORM - DESIGN SO FIRST BUNCH OF SUB-LEVELS INCLUDES THIS FORM] to review the service contract we've prepared for this project[MOVE TO THE **Contract Number** COLUMN AND PRESS **F6**] and see what options are available.

Service Contracts (05:37-06:28)

The service contract[MOVE TO THE **Dates in Effect** TAB] determines the period in which services are provided[HIGHLIGHT **Effect Date** = TODAY; **Expiration Date** = ONE YEAR FROM NOW] for each individual part or assembled component in the system under the initial warranty. At the end of this period[HIGHLIGHT **Renewal Option (Years)** = 2], the customer will be charged for annual maintenance.

In the **References** tab, we're going to update the **Service Terms** for this contract to "Service for New Systems". Consequently, work hours will be covered by the overall contract fee, but parts will not be.

In the **Items in Contract** sub-level form, you can see a list of components included in this contract and the charges for each[SHOW]. To ensure that our technicians provide services only for the actual parts that we provided, we've used the **Serial Number**[HIGHLIGHT] column to specify individual serialized parts, such as electrical components[IN THE LINE FOR PART S, MOVE TO **Serial Number** COLUMN].[MINIMIZE **Service Contracts** FORM.]

Managing Technicians (06:29-10:06)

Let's proceed to the **Service Calls** form[OPEN THE **Service Calls** FORM; MENU PATH: **Customer Service > Service Calls**]. Note that all aspects of the service call can be handled directly from this form, including the reporting of parts, labor and other related expenses, as well as customer billing.

[OPEN A NEW SERVICE CALL FOR CUSTOMER Discount Bicycle AND INDICATE A SERIAL NUMBER 1212121].

Moving to the **Service Info** tab, note that the **Service Terms**[HIGHLIGHT COLUMN] defined for this device have been filled in automatically. This mechanism ensures that the customer is charged for billable items only, when an invoice is generated for the service call.

In the **Scheduling** tab, we'll note that the call is also automatically **Assigned to** [HIGHLIGHT COLUMN] a default technician, based on default settings that you define ahead of time. We can also assign a second and third technician to a given call[HIGHLIGHT **2nd Technician** AND **3rd Technician** COLUMNS] if necessary.

In some cases, you may also want to divide the labor devoted to a given call into multiple tasks, to be handled by one or more different technicians, or other staff members. Such tasks can be opened directly from the **Task List** sub-level form.

[RETURN TO THE UPPER-LEVEL FORM]Note that you can also define color-coding[MOVE TO **Status of Call** COLUMN] for service calls, based on the values of designated columns. For example,[RIGHT CLICK IN COLUMN AND SELECT **Record Color > Define Record Color**] you may decide to display any urgent service calls in the color red[SHOW IN DIALOG BOX, CLOSE].

From the list of Direct Activations provided in this form, we'll select the **Technician Scheduling Calendar** to check when the company's technicians are available to handle this call over the next few days[DOUBLE-CLICK A FREE TIME SLOT TO SCHEDULE THE CALL FOR THE TECHNICIANS IN THE CALENDAR, SHOW THAT THE CALL NUMBER APPEARS AUTOMATICALLY, CLICK **OK** TO CLOSE]. Press **F1** from any scheduled item to view additional details, such as customer and part information[CLICK **OK** TO CLOSE]. Let's exit the calendar and return to the **Service Calls** form. Note that the call's **Start Time** and **End Time**[HIGHLIGHT COLUMNS] have been filled in automatically with the times we defined in the calendar. Note that ***Priority*** calendars can also be synchronized with your Outlook or Gmail calendar.

Another tool that can help you manage technician scheduling is the **Service Manager Dashboard**[RUN **Service Manager Dashboard**; MENU PATH: **Executive Reports > Customer Service**]. In the **Service Calls Requiring Attn** web part, we'll choose to view service calls by technician. The **Pie** display[CLICK **Pie** TAB] illustrates any imbalance in the current allocation of technicians to active service calls, enabling you to find and eliminate any bottlenecks. Note the other view options available in the choose list on the bottom-left corner[OPEN CHOOSE LIST. ALLOW A SECOND OR TWO TO READ OPTIONS], for instance, service calls by type of malfunction[SELECT OPTION. SHOW FOR A COUPLE OF SECONDS! THEN MINIMIZE DASHBOARD].

Yet another report[OPEN MENU PATH: **Customer Service > Service Calls > Service Call Reports > Technician Work Analysis Reports**] that can be useful in this regard is the **Service Call Load** report[RUN REPORT, SELECT A RANGE OF DATES], which enables you to view[HIGHLIGHT EACH OPTION AS MENTIONED] the daily, weekly or monthly service call load for a designated period[CLICK **Cancel**].

The **Service Calls** form also provides access to[OPEN LIST OF DIRECT ACTIVATIONS] a business process management or BPM flow chart[SELECT **BPM Flow Chart-Service Calls**] for service calls, which enables you to define rules that determine how and when call statuses are updated, and set up notifications such as automated e-mails that are sent to a designated user when service calls receive a given status[RIGHT CLICK THE "COMPLETED" STATUS AND SELECT **Rules**]. For example, in our company we've defined a rule for the "Completed" status[SELECT THE PREDEFINED RULE AND CLICK **Edit** TO VIEW DEFINITIONS] ensuring that SMS notification is sent to the relevant customer contact[HIGHLIGHT SECTION CALLED "DO THE FOLLOWING"] when a service call receives the "Completed" status[HIGHLIGHT THE "MESSAGE" SECTION; CLICK **OK** TO CLOSE DIALOG BOX].[EXIT BPM FLOW CHART]

Field Service Management (10:07-11:52)

[COMMENCE RECORDING FROM MOBILE DEVICE "DESKTOP"]***Priority***'s **Field Service** solution provides technicians with access to vital system tools and data from a variety of mobile devices[RUN FIELD SERVICE APP AND LOG IN] when working in the field. Moreover, the service vehicle used by each technician can be defined as a mobile warehouse, enabling you to manage inventory in real time for any parts that the technician carries with him or her when making field calls.

From the main screen, the field technician can open a list of active service calls[CLICK **Service Call** ICON] that are currently assigned to him or her. This list contains basic information about these active calls[SCROLL THROUGH TO SHOW], including[HIGHLIGHT SCHEDULING INFO (IN TOP-RIGHT CORNER OF EACH CALL)] the scheduled date and time for each. The context-sensitive menu[PRESS MENU BUTTON] for this screen presents options for filtering[HIGHLIGHT FILTER OPTION] the displayed service calls, or viewing a map overlay[SELECT MAP OVERLAY] of scheduled calls[SHOW FOR A FEW MOMENTS, THEN PRESS BACK BUTTON TO CLOSE].

Once the technician arrives at the customer site, he or she can use the available forms[SELECT DEMO EXAMPLE AND CLICK THE **Details** ICON] to view additional details pertaining to the reported malfunction and the serialized part being serviced, [PRESS MENU BUTTON] to report any actions[SELECT **Actions**] taken to repair the malfunction[CLICK **Choose malfunction** AND SELECT A MALFUNCTION, THEN CLICK **Choose action** AND SELECT Parts replacing],[PRESS BACK BUTTON, THEN MENU BUTTON, AND SELECT **Parts**] and to report any parts that are used[CLICK MAGNIFYING CLASS ICON TO OPEN CHOOSE LIST AND SELECT PART X] or returned during servicing[RECORD A **Quantity**, THEN CLICK THE **+** ICON]. Finally[PRESS BACK BUTTON TO RETURN TO **Service Calls** FORM], the technician can report the time[PRESS MENU BUTTON AND SELECT **Times**] spent on this service call[UNDER **Labor**, FILL IN START AND END TIMES FOR TODAY], including travel time[UNDER **Travel**, RECORD "00:45" MINUTES OF **Travel time**].

Billing & Financials (11:53-12:13)

The financial aspect of customer service is integrated into a number of different forms, such as the option to check the customer's credit[HIGHLIGHT **Customer Credit** SUB-LEVEL FORM] or open a new invoice [OPEN LIST OF DIRECT ACTIVATIONS AND HIGHLIGHT THE **Prepare Invoice/Credit Memo** PROGRAM]directly from within the **Service Contracts** and **Service Calls** forms.

In addition, a number of financial reports are available to help you keep track of billing, aging and open invoices.

Executive Reports (12:14-14:02)

Finally, let's review a few executive reports and BI tools that are available to the service manager.

One such tool, which we saw earlier in this video, is the **Service Manager Dashboard**[RESTORE]. From this Dashboard, we can view data for open service calls[HIGHLIGHT **Service Calls** WEB PART; MAKE SURE IT'S OPEN TO EITHER THE **Pie** OR **Graph** TAB] in a variety of cross-sections[IN CHOOSE LIST NEXT TO THE WORD "BY", SELECT **Customer Group**]. We can also use this Dashboard to check the Technician Scheduling Calendar[HIGHLIGHT **Technician Scheduling** WEB PART; MAKE SURE IT'S OPEN TO **Calendar** TAB] and to get an overview of the service provided to a particular customer[HIGHLIGHT **Service for Customer** WEB PART; IN THE **Customer** TEXT FIELD, RECORD "100069" AND CLICK **GO** TO SHOW CALLS FOR THE CUSTOMER Discount Bicycle Ltd].[PAUSE FOR A FEW MOMENTS SO VIEWERS GET A GOOD LOOK AT THE DATA/DASHBOARD; THEN CLOSE DASHBOARD]

Next, we'll use the **Executive Reports** menu[OPEN MENU PATH: **Executive Reports > Customer Service**] to run a BI report[SELECT THE **Service Call Analysis (BI)** REPORT] that can be used for service call analysis. Here too, data can be presented in various cross-sections[CLICK **All**], such as customer group[SELECT **Cust. Group Code**]. You can then continue to drill down within the data[CLICK "Cust. Group Code: PI"] to obtain more specific cross-sections of data[SELECT **Branch Code**]. Click on any of the provided links[HIGHLIGHT SECTION WITH LINKED VALUES, UNDER HEADINGS **Labor Hours** & **No. Calls**] to view more detailed information, or access individual records in ***Priority***.[PAUSE FOR A MOMENT SO VIEWERS GET A GOOD LOOK AT THE DATA/REPORT; THEN CLOSE BI REPORT]

[SHOW THE **Executive Reports > Customer Service** MENU]You can also generate your own customized reports, using the provided report generators[IN MENU, HIGHLIGHT THE **Service Call Report Generator** & THE **Servicing Report Generator**].

Finally, there are a number of service contract reports[OPEN MENU PATH: **Customer Service > Service Contracts > Service Contract Reports**] that can be used to analyze the profitability of service contracts[HIGHLIGHT **Contract Profitability-Summary** & **Contract Profitability-Detailed** REPORTS IN MENU]. These reports present your actual profit from designated service contracts, after deducting expenses such as free services and replacement parts that were provided under contract.

This concludes our summary of ***Priority***'s all-in-one solution for integrated systems suppliers, which enables companies to handle the pre-sale process, installation project, service contract and on-going customer service, and billing within a single software package, with no add-ons.

Related Documentation

- Management Tools clip
- Report Generator clip
- CRM Wizard
- Service Call Wizard
- Service Contract Wizard
- Aging Receivables Wizard